

**Case 12-M-0476, et. al.**  
**EDI Business Working Group (BWG)/**  
**Technical Working Group (TWG)**  
**Final Minutes – August 1, 2014**

**Administration**

- Review/Modify Agenda: The Draft Agenda was adopted with a modification concerning Staff's proposal for accelerated switching.
- The 7/25/2014 Draft Minutes, after being modified to add commentary on Industrial Classification Codes and Tax Exempt Status, as well to update the attendance list, was adopted as Final.
- DPS – no remarks.

**EDI Modification Priority Planning**

The BWG reviewed the updates to the spreadsheet capturing the proposed transaction assignments proposed during the July 25, 2014 meeting.

**Update on EDI Outreach Communication to REMS forum**

The BWG Chair spoke with Michael Meath to discuss using the REMS list to solicit informal comments concerning the EDI Working Group's proposed direction for the Discount Indicator, NYPA/ReChargeNY Indicator, ERVAS Questions, Utility Maintained EDI Guides and provision of utility full service billing amounts for use in ESCO Credit calculations. An email drafted by the BWG Chair could be sent out to the REMS list next week. The deadline for informal comments will be at the end of August so that any input may be considered in preparation of the October EDI Report.

**Staff Proposal Regarding Accelerated Switching of Commodity Providers for All Customer Classes**

The BWG Chair asked attendees to review the proposal which was filed in case numbers 12-M-0476, 98-M-1343 and 98-M-0667. While the merits of the proposal aren't to be debated within the EDI Working Group, several EDI transactions (or timing associated with the transactions) could be impacted which given the proposed implementation dates, could alter the anticipated post-October Report work plan.

**Technical Working Group Discussion**

**Pre-Enrollment Determination of EDI Transaction for non-usage items**

The TWG Chair reviewed the comments received. While the Low Income Indicator was included in the workpaper, for the purposes of the October EDI Report it will be excluded unless the Stay is lifted.

The transaction determinations are as follows:

- Enrollment Rejection Codes – 814 HU Response
  - For utilities that employ a comprehensive block, this is essentially no change, i.e. the existing code CAB would be used.
  - For utilities that employ a two-level block, the TWG should begin development of new codes to reflect an HU Block alone or an enrollment block alone.
    - If a customer has both an HU Block and an enrollment block, it should be functionally equivalent to a comprehensive block, so the CAB code could be used.

- ICAP Tag - 867HU Transaction in PTD\*FG loop
  - This approach is consistent with EDI implementation in other states.
- Number of Meters and Meter Numbers – 867HU Transaction in PTD\*FG loop
  - Today it is currently used in the PTD\*BQ loop; the data would be supplied twice in the 867HU with historical usage and once when no historical usage is available.
  - National Fuel will look into whether it provides historical usage on an account levels or by meter. If at the account level, it may ask to have the EDI standards rules modified to be treated analogously to Grid's implementation with regard to the PTD\*BQ loop.
- Account Settlement Indicator – 867HU Transaction in PTD\*FG loop.
- NYPA ReCharge Indicator – 867HU Transaction in PTD\*FG loop.
  - It was noted this may end up being a non-EDI item but for now it will be treated as an EDI item. It can be dropped if the final determination is non-EDI treatment.
- Utility Discount indicator – 867HU Transaction in PTD\*FG loop.
- Industrial Class Indicator– 867HU Transaction in PTD\*FG loop.
- Tax Exempt – 867HU Transaction in PTD\*FG loop.
  - The title should be changed to Tax Exempt Status.
- Customer Supply Status – 867HU Transaction in PTD\*FG loop.

It was noted that as proposed, if the customer did not have a block in place (comprehensive block or historic usage block in two level block implementations), an 867 HU Response would always be sent in response to an 814 HU Request, whether or not there was historic usage available.

#### **Post-Enrollment Determination of EDI Transaction for non-usage items**

The TWG Chair reviewed two workpapers (Workpaper - 814 Change Request - New Segments and 814 Enrollment Response – New Segments) reflecting changes from the 7/25/2014 EDI Working Group meeting.

#### **Priority I A Discussion**

There were no updates since last week's meeting.

#### **Priority II Discussion**

As a non-EDI Alternative, National Fuel will provide a workpaper at an upcoming meeting showing a prototype of a report of customer full service bill amounts that it would provide to ESCOs on its web site. The report, which is based upon information available to customers online in National Fuel's calculator, is designed to aid ESCOs in their preparation of an ESCO bill credit. The workpaper will compare what the customer sees to what the ESCO will see in the report.

#### **Priority III Discussion**

NYSERDA has provided a draft Trading Partner Agreement to the utilities that will pilot provision of historic usage via EDI.

#### **Establish date/time for next meeting**

The next meeting will be a combined BWG/TWG meeting on 8/8/14 at 10 A.M. The primary focus will be technical development, as appropriate, for the Phase I items.

**Attendees**

Zeno Barnum – Hudson Energy	Jeff Begley – Fluent Energy
Mary Do – Latitude Technologies	Tom Dougherty – ISTA
Jeremy Euto – National Grid	Mark Webster – NYSEG/RG&E
Joe Falcon – Ambit Energy	Giovanni Formato – Con Edison
Jason Gullo – National Fuel Resources	Jackie Hernandez – Con Edison
Donna Satcher-Jackson – National Grid	Gary Lawrence – Energy Services Group
Janet Manfredi – Central Hudson	Veronica Munoz - Accenture
Mike Novak – National Fuel Gas	Debbie Rabago – Ambit Energy
Jay Sauta – Agway Energy Services	Joann Seibel – O&R
Sergio Smilley – National Grid	Jim Stauble - Accenture
Robin Taylor – DPS Staff	Cindy Tomeny – National Grid
Rick Tra – National Grid	Charlie Trick – NYSEG/RG&E
Debbie Vincent – UGI Energy Services	Jenifer Lorenzini – Central Hudson